CiviCRM user and admin exercises

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INTRODUCTION

About this book

This is a book of user and administrator training exercises for CivICRM.

It is written to be used as part of the 2 day user and administrator training. You can go through these exercises on a CivICRM training site. You trainer will give you the URL and logon details for your training site.

See the book 'CiviCRM: a comprehensive guide' (which you should receive in hard copy as part of this training) for further reference.

Each chapter in the exercises section of this book has a corresponding chapter in the book that you can use for more reference and to explore the topic in more depth.

Layout of exercises

Tasks are organised as follows. Each session has its own chapter. The chapter is split up into thematic sections containing one or more tasks. Each task is identified with a blue square.



Each task starts with a task icon. You can tick the box once you've completed the task

Instructions on how to complete the task can be found underneath the task.

1. If the task involves a lot of steps, they might be numbered.
2. Feel free to attempt the task without looking at the steps first.
3. There is space after each task for notes.
4. Once you have finished a task you can tick the box.



Read these for extra helpful information.

We want your feedback!

As you are going through these exercises, please make a note of any ideas to have to improve these exercises and this training. Any ideas on how we can make it clearer, more useful, easier to follow, etc. are gratefully received.

Before you start: localise your CiviCRM

Before you start, you'll need to make sure your install is set up correctly for your location.



Ensure that CiviCRM's localisation settings are correct for your location (e.g. the default country, language, currency, etc.)

Review Administer › Configure › Global settings › Localisation



If you're in the USA, you can skip this step as CiviCRM's default localisation is the USA.

Greentops Food co-op

This book uses Greentops Food coop. ***

What is CiviCRM?



CiviCRM is a powerful, web-based contact **relationship management** (CRM) system. It allows an organisation to record and manage information about the various people and other organizations it deals with. CiviCRM is more than just an address book, it also allows you to track your interactions with people and organizations and to get them to engage with, and potentially give money to, your organization through your website. The information you gather is all stored in one place but you can access it from almost anywhere.

CiviCRM focuses on the needs of **non-profits**. Most business CRMs are focused on managing commerce; CiviCRM emphasizes communicating with individuals, community engagement, managing contributions, and administering memberships.

CiviCRM is **open source**, which means there are no license costs or user fees associated with downloading, installing or using the software. You may incur costs if you use a consultant to implement CiviCRM to meet your specific needs and you may incur website hosting charges.

CiviCRM is **web-based**, which means it can be accessed by many users at the same time from different locations. It has been developed with the international community in mind, and translations and multi-language options are supported.

A model for understanding CRMs

One way to understand what a CRM does is to think of your personal address book with enhanced capabilities. Imagine that every time you make a phone call to a given person, your address book automatically makes a note of it, together with brief description of the conversation. It can also decide whether to ask this person for a particular favor, based on whether she did this favor for you a week ago, and schedule a follow-up meeting following the call. After using this address book for a while, you could ask "What were my interactions with Ji Lao?" or "How many people helped me this month?" and it would give you the whole history.

Now let's say you're organizing a dinner party and you want to invite all the people you've met during the previous year. Just write the invitation and tell your address book to send the email. You don't have to worry about anything else after this point (apart from preparing the dinner!). Your address book handles the RSVPs from all invited guests, together with information about who is vegetarian and who is not. It even lets you know two nights before the event how many people you can expect.

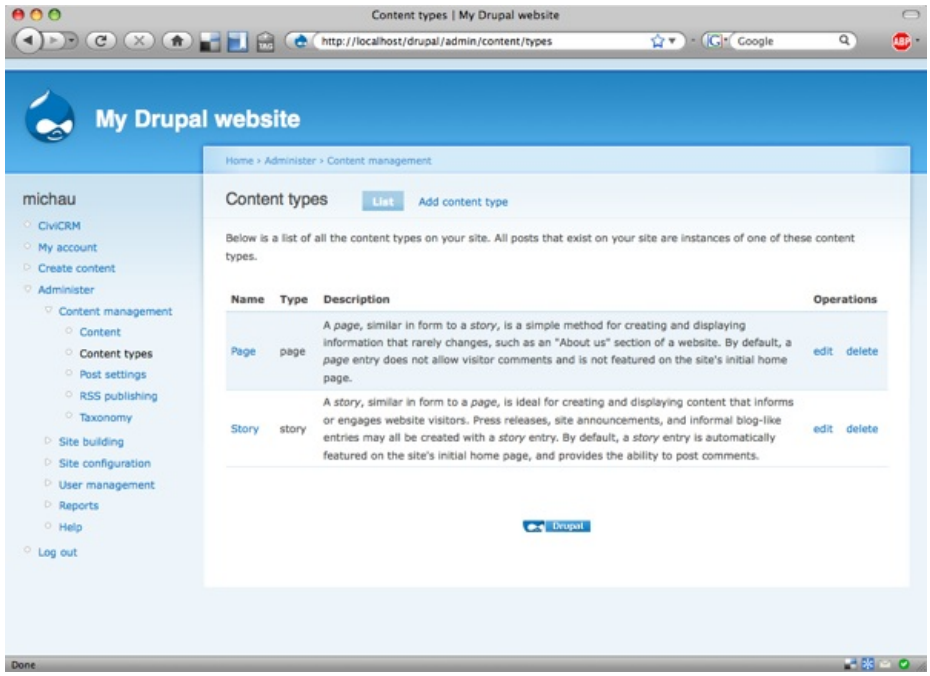
It would be great to have such an "assistant", right? Organizations need one even more. It's hard to remember all of your meetings, phone calls and other forms of contact (especially over the long term), but the more you know about the people and organisations you interact with, the more successful your work will be. You'll be able to target your message to specific groups, because you know who will be interested in specific topics, and you'll be able to observe their reactions and adjust your next interaction, and continue to improve how you talk to different groups.

CiviCRM and Content Management Systems

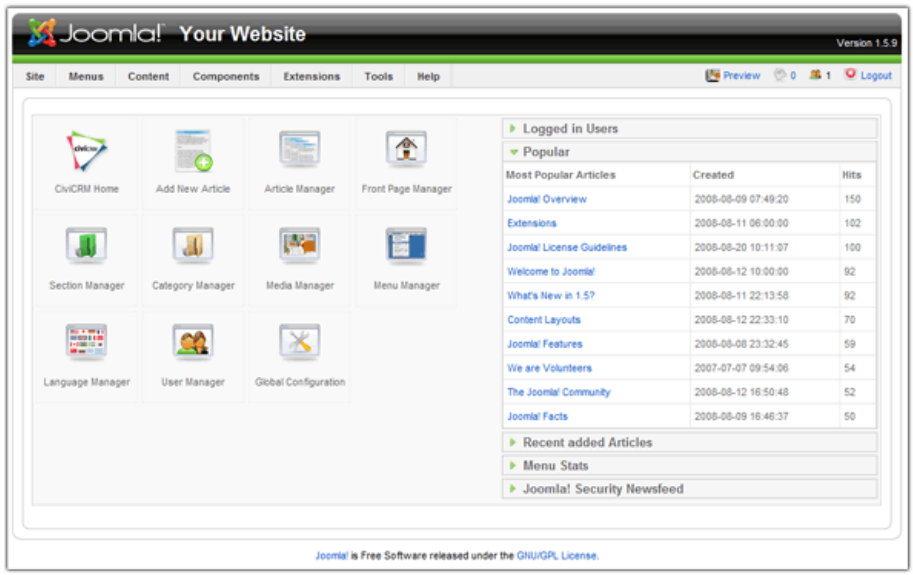
CiviCRM works together with another common piece of software: a content management system (CMS). A CMS is a tool for creating and managing websites, and most websites these days are based on a CMS.

Integration with a CMS offers a number of advantages for CiviCRM, most notably:

- visitors to your website can carry out many activities on their own, such as renewing their membership, signing up for events, requesting email updates, and donating money
- you can share parts of your data, for example event information, with visitors to your website



Drupal Content Management System - Content Types Screen



Joomla! Content Management System - Control Panel screen

Agenda

The training consists of presentations and hands on exercises

CiviCase is a presentation - not a group of exercises.

*** need to put CiviReport presentation before CiviContribute exercises

EXERCISES

Profiles and CMS integration

You want to collect volunteer information on a form on your website. To prevent "spam" submissions, you will use reCaptcha.

Configuring profiles



Change the profile name and change the settings to include the Captcha on the page

1. Administer › Customize › CiviCRM Profile
2. Click settings for this profile.
3. Change the name to "Volunteer Information"
4. In Advanced Settings pane...
5. Add new contacts to your "Active Volunteers" group



Add 3 more fields to the profile (in addition to what's already there)

```
Contact > Phone > Primary > Phone as 'Preferred Phone', required = yes
Contact > Email > Primary as 'Preferred Email', required = yes
Individual > Volunteering > Interested In as 'I am interested in (check all
that apply)', required = yes
```

1. Click Fields link
2. Click Add Field button
3. Fill in form
4. Click Save and new

Using profiles

*** need to introduce this more and think about how we get people to add the public website



Add a link to this profile on the your site's home page

1. Click Use (create mode) button to access this profile as an input form
2. Copy the URL from your browser location bar
3. Click Create content link in Drupal menu block (lower left side of screen)
4. Click Page

5. Title = Volunteer Signup, Body = Paste your profile's URL into the body.
6. If you're familiar with HTML markup, surround it with an <a href=....> tag to make it a nice with link text = "Signup to Volunteer Now!"
7. Under Publishing Options check "Promote to front page"
8. Save your page



You can use two browsers (i.e. Firefox and Internet Explorer) to check what the site looks like for logged in and logged out users at the same time.



Test your new profile

Log-out and click the link to go to your new profile and fill it in:

```
Tanya Thomas
212 520-0001
tanya@bigco.com
Interested in: cashiering
```

Log back in and check Tanya's record (she should be in Active Volunteers group and have the expected data).



We've only scratched the surface of what you can do with profiles. Much more in ***

[advanced]

reCaptcha

*** blurb about what this is



Verify the reCaptcha keys are configured

1. Administer › Global Settings › Miscellaneous Settings
2. Modify the "Name and Address" Profile to collect "Volunteer Information".
3. Check the box to use reCaptcha on this profile

Custom data

Your coop needs to keep track of some special information for individual contacts - volunteering interests and experience. You'll want to be able to search on all fields.

Creating custom data



Create a custom data set with the following criteria

```
Name: Volunteering
User For: Individual
Allow multiple records: NO
Display Style: Tab
```

Administer › Customize › Custom Data › Add Set of Custom Fields.



what does display style mean

what the the advantages and disadvantage of both.



Add two custom fields to this set.

Custom field 1

```
label: Interested in (check all that apply)
Data and Field type = Alphanumeric / Checkbox
Options:
Label = Cashiering, Value = Csh
Label = Stocking, Value = Stk
Label = Store maintenance, Value = Mnt
Required = No
Searchable = Yes
```

Custom field 2

```
Label = Trained in (check all that apply)
Data and Field type = Alphanumeric / Checkbox
Options = (reuse set of options you created for the field above)
Required = No
Searchable = Yes
```

Adding custom data to records



Update Jason Brown's contact record to record his 'Volunteering' info

He's interested in 'cashiering' and trained in 'cashiering'.

Contacts and their data

Adding basic contact details

You've just received email from two people who might be interested in joining the food co-op. You're in a hurry and all you have is their name and email address.



Add the contacts below.

```
Jason Brown, jason.brown@gmail.com
Cathy Johnson, cathyj@example.org
```

1. Use the "quick search" box to make sure they aren't already in the database.
2. Contacts › New Indivual

Jason is becoming active in the co-op and you want to add more details for him.



Add Jason's mailing address and his work and home phone numbers.

```
144 E. 13th Street Apt 5a
New York, N.Y. 10003
212-123-1234 work
212-567-5678 home
```

Communication preferences

He's asked that for snail mail you use as the addressee name and for postal mail greetings. He's also asked that you NOT share his contact info with any other organizations. *** rewrite this

"Honorable Jason Brown"

"Dear Judge Brown"



Record the communication preferences above against Jason's contact record.

Sharing addresses

Cathy calls and asks you to add her husband - Alan Johnson - to the database. She also gives you her home address.



Add the address below to Cathy's record.

```
Home: 663 8th Ave., New York, N.Y. 10036
```



Create a record for Alan Johnson's and share Cathy's address

Select "Share Address With" for his address (selecting Cathy's record)

Adding relationships



Add "Spouse relationship" between Alan and Cathy

Use the Actions button and click 'Add Relationship'

Importing members

You want to import a mailing list which you've been tracking in a spreadsheet and put the contacts into

*** You can download the file here.***



Import the members



Ignore columns that do not exist in your CiviCRM database.



Add Cathy Johnson to your new 'Active Volunteers' group.

1. Find her record using the quick search box
2. Click the 'Groups' tab.



Schedule a meeting with her for 2pm next Wednesday to discuss ideas for a fundraiser

Click 'Meeting' from the Actions menu which appears underneath the contact name.

Smart groups

Smart groups are ***



Create a Smart Group of all individuals in your DB who meet the following criteria

`live in New York state (New York Contacts).`

1. Search > Advanced Search
2. Address Fields, state = "New York"
3. Click 'Search'
4. Click checkbox top left of listings (to select all)
5. From actions dropdown select New Smart Group
6. Group Name = "New York Contacts"

Printing labels



Test out the mailing labels function by printing mailing labels for your 'New York Contacts' group.

1. Search > Find Contacts
2. Select Group = "New York Contacts" and click Search
3. Click checkbox top left of listings (to select all)

4. From actions dropdown select Mailing Labels

Configuration

Customising the contact screen

Your organization doesn't need to store Instant Messenger or Open ID (an explanation of what this is)information for contacts.



Disable Instant Messenger and Open ID.

1. Go to Administer › Configure › Global Settings › Site Preferences
2. Unchecking them in the Contact Editing section.
3. Verify your change by clicking the Create New button (upper left side of screen) and creating a new Individual contact.

You need the 'Quick Search' box to include 'City' in the results to help staff quickly identify folks with similar names etc.



Add City to the quick search

1. Go to Administer › Configure › Global Settings › Search Settings
2. Find the right box to enable City
3. Try it out by using the Quick Search.

You're not planning on using the 2 'Additional Address' fields for contact addresses.



Disable additional address 1 and 2

1. Go to the Administer › Configure › Global Settings ›Address Settings screen
2. Uncheck the two relevant boxes
3. Check that the correct boxes are hidden.

Enabling mapping

The co-op wants to use CiviCRM's "mapping" features.

Check that a mapping provider has been configured

1. Administer › Global Settings › Mapping & Geocoding

Map a contact

1. Find Jason Brown's contact record (use Quick Search box in upper left corner)
2. Edit and re-save it.
3. Verify that there's a map link on his Contact Summary page.

[advanced tasks]

Editing email templates

Some blurb ***

Add the following footer text to the bottom of the default offline contribution receipts.

```
Your gift is tax-deductible to the full extent of the law. Greens Coop is a
nonprofit organization; our federal tax identification number is: 20-5367752.
Please keep this letter as a receipt for tax purposes.  Edit the System Message
Templates (Text and HTML versions) for "Offline contribution receipts"
```

1. Administer › Configure › Message Templates - System Workflow Templates tab.

CiviContribute

Blurb about contribute

Recording contributions

Tanya Thomas has sent a cheque to your organisation in the post. You want to record this donation and make sure she is sent a thankyou and receipt.



Find Tanya Thomas, record a donation and send a receipt

Use the following details for her donation

```
Contribution type = Donation
Amount = $500
Source = Summer Campaign
Paid By = Check (#509)
```

1. Quick Search for "Thomas" - select her record and click enter.
2. Click the Actions button › Add Contribution
3. Make sure that you check the send receipt button

*** are emails turned on on test site - would be nice to see the receipt. can we set a cc for the receipt?

Online contribution pages

We are going to create a contribution page. To collect money online we need to have a payment processor (or use the pay later). For now, we will create a dummy payment processor.



Configure the "dummy" payment processor

Use the following settings:

```
Type = "Dummy"
Name = "Dummy Processor"
User = dummy
URL = http://dummy.com
Test User = dummytest
URL = http://dummytest.com
```

Administer > Configure > Global Settings > Payment Processors:

Rather than creating a new one, we'll edit an already existing one.



Update the sample online contribution page

1. Contributions › Manage Contribution Pages
2. Click Configure for "Help Support CiviCRM" page
3. Click Title and Settings and modify the page title and introductory text ("Help Support our Co-op", etc.) and click Save
4. Click Contribution Amounts and select "Dummy" as the payment processor and click Save



Test your contribution page

Click the link in the yellow box on top of the Configure screen to try our your "LIVE" contribution page.

You can use the following details for your card

```
Use 4111111111111111 for your Visa card, 000 for your Security Code and Jan
2012 as the expiration date
```

Reporting on contributions

You want to track year to date contributions from people in your Active Volunteers group.



Create an instance of the Donor Summary report which will do this.



Put a report on your dashboard

1. Go to Reports › Create Reports from Templates and create a new instance of the "Donor Report (Summary)".
2. The new report shows all contributions YTD as a pie chart.
3. Title this new report instance: "Contributions - YTD (Chart)", and mark it to be "Available for Dashboard".
4. Now go to CiviCRM › Home (the main dashboard) and add your new report to the dashboard.

CiviMember

You're ready to track memberships in the coop. You'll need to first add the coop itself as an organization (Greentops Co-op), then setup your membership types. All memberships are for "rolling" 12 month periods.

Configuring memberships

TASK

Create some membership types

Create the following membership types:

Individual Membership

```
Membership Organization = Greentops Co-op
Minimum fee = $50
Period = 1 year, rolling
```

Sustaining Membership

```
Membership Organization = Greentops Co-op
Minimum fee = $100
Period = 1 year, rolling
```

1. Click Create New button (left column) › Organization and add "Greentops Co-op" as an organization contact.
2. Go to Administer › CiviMember › Membership Types
3. Click Add Membership Type

Membership statuses

blurb about membership statuses. For your co-op, the grace period for 'expiring' memberships is 2 months.



Check and adjust membership status rules as needed

Administer › CiviMember › Membership Status Rules - edit the "Expired" status rule).

Online membership signup

Blurb about how you use a contribution page for this.



Create a new online contribution page to be used for membership signup and renewal

Allow folks to "pay by check" if they want. Include the "Volunteer Information" profile in the contribution page. Use your "Dummy" processor. Also enable the Tell a Friend feature.



Add a link to your membership signup and renewal page to the front page of your site

Edit the content page you created for your Volunteer Signup profile link.



Test your membership signup page

Logout and use your online membership signup page as an anonymous visitor. Log back in and check that the new contact AND new membership are there using Find Members.

```
Use 4111111111111111 for your Visa card, 000 for your Security Code and Jan
2012 as the expiration date
```

CiviEvent

Your co-op holds a quarterly volunteer meetup. It's free (of course)

Event templates

Event templates are useful ***

TASK

Create an event template for this meetup

Events › Event Templates

You want to know who's coming, so enable online registration.

The event is always held at:

```
Beth-el Synagogue
79 Leonard St
New York, N.Y. 10013
```

Include your "Volunteer Information" profile in the online registration so you get folks information when they register.

Configuring events



Create an event template for this meetup

Create an event for next month's meetup (6pm, 1st Wednesday of the month)



Register a new contact for the meetup

Create New button › Event Registration

Participant's name is Jill Peterson. Check if she's already in your DB (type Peterson into "Select Contact" box). If she's not, click "create new contact" › Individual and add her (her email is jill.peterson@example.org).



Add a link to your event info page on your site's home page

Edit the Drupal page you created earlier.



Test your event registration

Logout and register for the meetup as an anonymous user.

Log back in and find your newly registered participant from Events › Find Participants.



Send a reminder email to all participants

It's now 2 days before the meetup in the upcoming meetup reminding them of the date and time (from Events › Find Participants).



Save your email as a "Template" before sending it so you can use it again for future meetup reminders.

Email

TASK

Review and update your default Mailing Footer

Creating mailing lists

Make your active volunteers group a mailing list

Contacts › Manage Groups

Create a New Mailing for you Active Volunteers group

1. Accept defaults for reply and tracking
2. Compose a message appeal including a link to an active online contribution page on your site
3. Test / Preview your mailing
4. Schedule mailing to be sent tomorrow 9:00am

FINDING OUT MORE

Who is CiviCRM?

CiviCRM has a unique and diverse community centered around developing, using, and documenting the software. Our community includes the CiviCRM core team, people at the non-profits that use CiviCRM; consultants working with a number of non-profit organizations; programmers and developers, power users, volunteers and community organizers! We are also closely related to many other open source projects.

Each member of the community interacts with CiviCRM in their own way, working to improve the software and how we organize ourselves. The strength of community comes from this diversity and the ease with which someone can join us, and means that we are constantly changing and improving, often in unexpected ways.

Like all communities your membership is characterised by your interactions. If you treat others well, have some fun, and help others, then you can expect to enjoy being a member of the CiviCRM community. But if you are prone to complaining or don't use a respectful tone in communications, or if you see the community just as a resource and not as a collection of very kind, generous and clever people, then you are probably not going to get much of a response. Treat people well and you can find the CiviCRM community fun and rewarding.

History

CiviCRM started in 2004 by Dave Greenberg, Donald Lobo and Michal Mach. The founders had a lot of previous experience working with non-profit organizations and tools. The group was influenced very early by Zack Rosen and Neil Drumm, who convinced them to use Drupal as a fundamental cornerstone for CiviCRM. This decision has meant that the developers have been able to leverage a lot of the functionality that Drupal provides, freeing the team up to focus on building the features necessary to make a great CRM.

In 2005 the first version of CiviCRM was released with two of the core modules in place: CiviMail and CiviContribute (you can read more about these later).

Since those early days CiviCRM has built a large community of users and contributors (there are now over 8000 installed sites), the software has gone from strength to strength (there are now 8 core modules and additional third party components), and the core team has expanded to 8 members. There is also a large ecology of free software contributors around the project and high-profile non-profit organisations such as Wikipedia, Creative Commons, Mozilla, and Amnesty International use CiviCRM.

It's good to talk

CiviCRM is an open and learning community, and people are ready to hear your ideas. If you have a good idea, there's nothing to stop you carrying it out - but the best way to start, is to start talking about it.

If you're not sure where to start, the best place is probably the **community forum** (http://forum.civicrm.org/). Ask people what they think about your idea. There's a wealth of experience on the forum, and with a bit of luck, someone will have tried something similar before. CiviCRM people are a friendly bunch and their guiding philosophy is collaboration.

Depending on your idea, you'll be directed to the next best place - maybe an article on the **blog** (http://civicrm.org/blog/), a page on the **wiki** (http://wiki.civicrm.org/), a teleconference or a meeting up with another community member in real life, yes that's right, REAL LIFE!

Be the change

So you have a great idea. Now you need an equally great action plan to accompany this idea and then you'll need to implement it. Although the CiviCRM community is friendly and supportive and will like to be involved and updated about your project, you'll need to be the driver. How will you get the resources together for your project? How can you fit it in with your day job? Finding a way to simultaneously achieve your own objectives and benefiting the CiviCRM community is the best way of getting things done.

And finally...

If you're a CiviCRM user who has an ongoing relationship with a consultant, there's nothing to stop you from also being an active member of the community. The community really benefits from direct feedback from end users - your consultant is only one person or organization - by asking on the forums you're opening yourself up to help and input from the entire community.

Getting more help

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Visit http://software.booki.cc